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FOOD MARKETING INSTITUTE

IN-STORE SYSTEMS STUDY

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SYSTEMS
STUDY

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The Food Marketing Institute (FMI) is a nonprofit association conducting programs in research, education and public affairs on behalf of its 1,500 members -- food retailers and wholesalers and their customers in the United States and around the world. FMI's domestic member companies operate approximately 19,000 retail food stores with a combined annual sales volume of $180 billion -- more than half of all grocery sales in the United States. FMI's retail membership is composed of large multi-store chains, small regional firms and independent supermarkets. Its international membership includes 250 members from 60 countries.

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EXECUTIVE SUMMARY

The In-store Systems Study examines various aspects of point-of-sale scanning systems, in-store applications and electronic marketing applications. It is designed to equip executives with information to assist them in their strategic business decisions, particularly in an era when applied technology is crucial to the survival and growth of food distribution companies.

This report is based on responses of 215 FMI member companies. Since FMI members tend to be at the cutting edge of technology, figures in this study may be somewhat higher than those of the total industry.

Respondents report that the most common point-of-sale (POS) system in stores is NCR, followed by ICL. The primary benefits currently derived from POS systems are improved pricing accuracy and better customer service. By 1995, companies expect to benefit from these systems not only through continued pricing accuracy and customer service, but also through improved inventory management, new customer services and better advertising/promotions.

Price verification is the most prevalent in-store application currently in use and is considered the most beneficial, as reported by survey respondents. Fax machine, scale interface and direct store delivery are also common. Many respondents anticipate increased in-store application usage by the end of 1992, with price verification, direct store delivery, scale interface and labor scheduling present in all their stores. They predict reaping significant benefits from direct store delivery, time and attendance, scale interface and labor scheduling by 1995.

According to survey respondents, electronic marketing tools are not as widely used as other in-store applications, although growth in usage rates is anticipated by the middle of the decade.

Respondents said that problems with in-store systems are generally found in the implementation or integration of systems, with equipment replacement or upgrade as the solution.

METHODOLOGY

This report was based on responses of 215 FMI member companies. These figures may be somewhat higher than those of the industry because FMI members tend to be at the cutting edge of technology.

Data was obtained from two mailings. Questionnaires, a sample of which is included in the back of this report, were addressed to management information systems or in-store system executives.

Frequency distributions and cross-tabulations were obtained to determine relationships between and among variables. The Chi-square test was used to determine statistical significance among proportions at a 95 percent confidence level. Where appropriate, means, medians and modes were used. Bases in the survey results refer to the number of companies that answered the question.

Respondents were asked to rate benefits by various systems from 1.0 to 3.0, according to the benefit they derive from each, with 1.0 meaning no benefit, 2.0 meaning some benefit and 3.0 indicating major benefit.

PROFILE OF RESPONDENTS

Roughly four-fifths of the sample has sales over $50 million annually, almost half of which earn between $50-$249 million each year. Fifty-seven percent of the sample is composed of small companies (having fewer than 11 stores) and the remainder consists of larger firms (Table 1).

TABLE 1

PROFILE OF RESPONDENTS

	%
SALES	
UNDER $50M	22
$50 - 249M	48
$250 - 499M	11
$500 - 999M	3
$1 - 2.9B	6
$3B +	10
NUMBER OF STORES	
10 OR LESS	57
OVER 10	43

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

POINT-OF-SALE SCANNING SYSTEMS

POS SYSTEM PENETRATION

NCR appears to be the predominant type of POS system in stores. Almost forty percent of respondents possess the brand in all their stores and only 33 percent of the sample do not have it in any of their stores. ICL is a far second, as indicated by 12 percent of respondents who have the brand in all their stores and 68 percent of the sample who do not have it in any of their stores (Table 2).

BELOW IS A LIST OF POS SYSTEM VENDORS. INDICATE THE NUMBER OF STORES YOUR COMPANY HAS THAT MAKES USE OF EACH VENDOR.

TABLE 2

PERCENT OF STORES WITH POS SYSTEMS

TYPE OF POS SYSTEM	BASE	NONE	1-24%	25-49%	50-74%	75-99%	100%
ICL/DATACHECKER/FUJITSU	(213)	68	8	5	4	3	12
DTS	(213)	81	11	3	1	1	4
IBM	(213)	81	11	3	1	2	4
NCR	(213)	33	7	6	7	8	39
SWEDA	(213)	86	7	3	2	1	2
TEC	(213)	91	5	2	0	0	2
CASIO	(213)	85	8	2	1	1	3
OTHER	(159)	88	7	1	1	-	3

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

BUDGET ALLOCATION

Over half of all respondents allocate up to 25 percent of their 1992 POS capital budget to new installations and 45 percent allocate up to 25 percent to systems upgrades (Tables 3 and 4).

WHAT PERCENT OF THE 1992 POS CAPITAL BUDGET WILL BE ALLOCATED FOR NEW SYSTEM INSTALLATIONS?

TABLE 3

PERCENT OF '92 POS CAPITAL BUDGET ALLOCATED FOR NEW SYSTEMS INSTALLATIONS

	TOTAL
BASE	(175)
UP TO 25%	54
26% - 50%	13
51% - 75%	19
76% - 100%	14

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

WHAT PERCENT OF THE 1992 POS CAPITAL BUDGET WILL BE ALLOCATED FOR SYSTEM UPGRADES?

TABLE 4

PERCENT OF '92 POS CAPITAL BUDGET ALLOCATED FOR SYSTEM UPGRADES

	TOTAL
BASE	(179)
UP TO 25%	45
26% - 50%	20
51% - 75%	14
76% - 100%	21

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

BENEFITS OF POS SYSTEMS

Current

Companies were asked to rate benefits associated with POS systems from 1.0 to 3.0, according to the benefit level they currently derive from each, with 1.0 meaning no benefit, 2.0 meaning some benefit and 3.0 indicating major benefit.

Respondents reported that improved pricing accuracy and better customer service are the primary benefits they presently experience from point-of-sale systems as indicated by the mean scores of 2.63 and 2.47, respectively, and modes of 3.0. Lower total store labor costs and lower front-end costs follow, with mean scores of 2.20 and 2.14, respectively, and modes smaller of 2.0 (Table 5).

Large companies are more likely to experience greater total store labor cost reductions than small firms as indicated by 38 percent of large firms compared to 22 percent of small ones (Table 6).

BELOW IS A LIST OF BENEFITS ASSOCIATED WITH POS SYSTEMS. KINDLY RATE EACH BENEFIT BY CIRCLING THE NUMBER THAT BEST DESCRIBES THE DEGREE TO WHICH POS SYSTEMS HAVE AIDED YOUR COMPANY TO DATE AND THE DEGREE TO WHICH YOU ANTICIPATE THEM TO BENEFIT YOU BY 1995.

TABLE 5

RATINGS OF POS BENEFITS TO DATE

BENEFIT	BASE	MEAN	MODE
IMPROVED PRICING ACCURACY	(206)	2.63	3
BETTER CUSTOMER SERVICE	(207)	2.47	3
LOWER TOTAL STORE LABOR	(207)	2.2	'
LOWER FRONT-END COSTS	(202)	2.14	2
NEW CUSTOMER SERVICE	(201)	1.91	2
IMPROVED ADVERTISING/PROMOTIONS	(206)	1.89	2
INCREASED PRODUCT MIX PROFITABILITY	(202)	1.78	2
BETTER INVENTORY MANAGEMENT	(205)	1.73	2
INCREASED SALES	(204)	1.71	2
INCREASED PRODUCT VARIETY	(202)	1.62	1

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

TABLE 6

TOTAL STORE LABOR COST REDUCTIONS TO DATE BY NUMBER OF STORES

	TOTAL	10 OR LESS	OVER 10
BASE	(207)	(114)	(87)
	%	%	%
NONE	11	14	7
SOME	59	64	55
MAJOR	30	22	38

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

Anticipated By 1995

Respondents said that the five major benefits anticipated from POS systems by 1995 are improved pricing accuracy (mean = 2.73), better customer service (mean = 2.59), better inventory management (mean = 2.45), new customer services (mean = 2.44) and improved advertising/promotions (mean = 2.39), all with modes of 3.0 (Table 7).

Small companies are less likely to anticipate incremental sales benefits from point-of-sale systems than their larger counterparts. Thirty-six percent of small firms expect no sales benefit from point-of-sale systems by 1995 compared with 18 percent among larger ones (Table 8).

BELOW IS A LIST OF BENEFITS ASSOCIATED WITH POS SYSTEMS. KINDLY RATE EACH BENEFIT BY CIRCLING THE NUMBER THAT BEST DESCRIBES THE DEGREE TO WHICH POS SYSTEMS HAVE AIDED YOUR COMPANY TO DATE AND THE DEGREE TO WHICH YOU ANTICIPATE THEM TO BENEFIT YOU BY 1995.

TABLE 7

RATINGS OF ANTICIPATED POS BENEFITS BY 1995

BENEFIT	BASE	MEAN	MODE
IMPROVED PRICING ACCURACY	(206)	2.73	3
BETTER CUSTOMER SERVICES	(207)	2.59	3
BETTER INVENTORY MANAGEMENT	(205)	2.45	3
NEW CUSTOMER SERVICE	(201)	2.44	3
IMPROVED ADVERTISING/PROMOTIONS	(206)	2.39	3
LOWER TOTAL STORE LABOR COSTS	(207)	2.3	2
LOWER FRONT-END COSTS	(202)	2.27	2
INCREASED PRODUCT MIX PROFITABILITY	(202)	2.26	2
INCREASED PRODUCT VARIETY	(202)	1.94	2
INCREASED SALES	(204)	1.89	2

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

TABLE 8

INCREASED SALES BENEFIT ANTICIPATED BY NUMBER OF STORES

	TOTAL	10 OR LESS	OVER 10
BASE	(181)	(97)	(78)
	%	%	%
NONE	27	36	18
SOME	57	51	63
MAJOR	16	13	19

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

IN-STORE APPLICATIONS

PENETRATION OF IN-STORE APPLICATIONS

Price verification is the most popular in-store application currently in use as evidenced by 53 percent of the total sample who use it in 100 percent of their stores. It is followed by fax machines (37 percent), scale interface (35 percent) and direct store delivery (33 percent), all of which are currently used in all stores among a third of the sample(Table 9).

Overall, respondents expect increased in-store application usage as evidenced by higher percentages of companies anticipating usage of each application by the end of 1992 compared to those currently using them. For instance, 53 percent of all companies report that they have price verification packages currently in use in 100 percent of their stores, but 71 percent anticipate having the same application in all their stores by the end of next year (Tables 9 and 10).

BELOW IS A LIST OF IN-STORE APPLICATIONS. LIST THE NUMBER OF STORES IN YOUR COMPANY THAT:

- CURRENTLY USE EACH APPLICATION;
- PLAN TO USE EACH APPLICATION BY THE END OF 1992.

TABLE 9

PERCENT OF STORES WITH IN-STORE APPLICATIONS CURRENTLY IN USE

IN-STORE APPLICATIONS	BASE	NONE	1-24%	25-49%	50-74%	75-99%	100%
DIRECT STORE DELIVERY	(211)	40	13	3	6	5	33
PHARMACY	(211)	66	14	7	4	3	9
LABOR SCHEDULING	(212)	57	13	3	3	2	22
TIME & ATTENDANCE	(212)	49	11	3	3	5	27
ELECTRONIC SHELF LABELS	(211)	90	2	1	1	1	6
PRICE VERIFICATION	(212)	15	5	8	11	7	53
COMPUTER ASSISTED REORDER	(212)	90	3	1	1	--	6
ENERGY MANAGEMENT	(211)	64	9	6	5	1	15
VIDEO RENTALS	(211)	54	10	9	6	3	18
SCALE INTERFACE	(212)	41	8	6	5	5	35
ELECTRONIC MAIL	(211)	82	2	2	2	1	11
FAX MACHINE	(212)	37	14	5	4	3	37
CREDIT CARDS	(211)	57	12	7	3	1	20
EBT	(210)	90	6	--	--	--	5
EFT	(210)	75	8	2	2	2	12
OTHER	(159)	90	4	--	--	1	6

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

The five most common applications companies anticipate having in 100 percent of their stores by December of 1992 are price verification (71 percent), direct store delivery (58 percent), time and attendance (52 percent), scale interface (51 percent) and labor scheduling (46 percent) (Table 10).

TABLE 10

PERCENT OF STORES WITH IN-STORE APPLICATIONS BY 1992

IN-STORE APPLICATION	BASE	NONE	1-24%	25-49%	50-74%	75-99%	100%
DIRECT STORE DELIVERY	(211)	16	5	6	7	7	58
PHARMACY	(211)	63	12	8	6	4	7
LABOR SCHEDULING	(212)	33	6	6	5	4	46
TIME & ATTENDANCE	(212)	26	5	7	5	4	52
ELECTRONIC SHELF LABELS	(211)	78	7	--	2	1	12
PRICE VERIFICATION	(212)	7	2	4	5	10	71
COMPUTER ASSISTED REORDER	(212)	75	8	1	2	1	14
ENERGY MANAGEMENT	(211)	60	7	6	5	2	19
VIDEO RENTALS	(211)	49	8	7	8	5	23
SCALE INTERFACE	(212)	22	7	6	7	6	51
ELECTRONIC MAIL	(211)	57	5	4	3	4	28
FAX MACHINE	(212)	31	12	4	4	3	47
CREDIT CARDS	(211)	31	12	8	5	3	41
EBT	(210)	69	11	2	1	1	17
EFT	(210)	49	9	4	4	3	33
OTHER	(159)	88	3	1	--	1	8

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

BENEFITS FROM IN-STORE APPLICATIONS

Current

At present, few companies are experiencing major benefits from in-store applications as indicated by their low mean scores. Respondents rate price verification the most beneficial in-store application to date, as evidenced by the mean of 2.52 and the mode of 3.0. Direct store delivery is a far second, having garnered a mean of 2.02, although its mode is also 3.0 (Table 11).

While 74 percent of the respondents said they currently do not derive benefits from electronic mail, small firms are less likely to derive benefits from it than larger ones. This is shown by the fact that 85 percent of small companies indicated no benefit from electronic mail compared to 65 percent among large firms (Table 12).

PLEASE RATE EACH IN-STORE APPLICATION BY CIRCLING THE NUMBER THAT BEST DESCRIBES THE DEGREE TO WHICH IN-STORE SYSTEMS HAVE AIDED YOUR COMPANY TO DATE AND THE DEGREE TO WHICH YOU ANTICIPATE EACH TO BENEFIT YOU BY 1995.

TABLE 11

RATINGS OF BENEFITS FROM IN-STORE APPLICATIONS TO DATE

APPLICATION	BASE	MEAN	MODE
PRICE VERIFICATION	(195)	2.52	3
DIRECT STORE DELIVERY	(193)	2.02	3
SCALE INTERFACE	(186)	1.96	2
FAX MACHINE	(175)	1.91	2
TIME AND ATTENDANCE	(179)	1.88	1
LABOR SCHEDULING	(185)	1.7	1
VIDEO RENTALS	(171)	1.65	1
ENERGY MANAGEMENT	(171)	1.58	1
PHARMACY	(168)	1.58	1
CREDIT CARDS	(175)	1.57	1
EFT	(161)	1.43	1
ELECTRONIC MAIL	(164)	1.38	1
EBT	(161)	1.2	1
COMPUTER ASSISTED REORDER	(165)	1.16	1
ELECTRONIC SHELF LABELS	(166)	1.16	1

SOURCE: IN-STORE SYSTEMS SURVEY, FOOD MARKETING INSTITUTE, 1991

TABLE 12

ELECTRONIC MAIL BENEFITS TO DATE BY NUMBER OF STORES

BASE:	TOTAL (164) %	10 OR LESS (80) %	OVER 10 (78) %
NONE	74	85	65
SOME	15	9	18
MAJOR	12	6	17

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

Fifty-four percent of the sample reported that they do not derive benefits from energy management applications. However, large companies are more likely to experience some benefit from it than their smaller counterparts. This is evidenced by 41 percent of large firms that report some benefit from energy management applications compared to 27 percent among smaller firms (Table 13).

While there is no statistical significance in the differences in scale interface benefit ratings among the total sample, small companies are more likely than large ones to currently experience major benefits from it. Forty percent of small firms currently obtain major benefits from it compared to 17 percent among their larger counterparts (Table 14).

Small firms are more likely to derive major benefits from fax machines than larger ones. Thirty-eight percent of small concerns reported major benefits from fax machines to date, compared to only seven percent among larger ones (Table 15).

TABLE 13

ENERGY MANAGEMENT BENEFIT TO DATE BY NUMBER OF STORES

	TOTAL	10 OR LESS	OVER 10
BASE:	(171)	(88)	(79)
	%	%	%
NONE	54	64	44
SOME	33	27	41
MAJOR	12	9	15

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

TABLE 14

SCALE INTERFACE BENEFIT TO DATE BY NUMBER OF STORES

	TOTAL	10 OR LESS	OVER 10
BASE:	(186)	(103)	(77)
	%	%	%
NONE	33	25	46
SOME	37	35	38
MAJOR	30	40	17

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

TABLE 15

FAX MACHINE BENEFIT TO DATE BY NUMBER OF STORES

	TOTAL	10 OR LESS	OVER 10
BASE:	(175)	(94)	(75)
	%	%	%
NONE	33	28	41
SOME	42	34	52
MAJOR	25	38	7

SOURCE: IN-STORE SYSTEMS SYUDY, FOOD MARKETING INSTITUTE, 1991

Anticipated By 1995

Respondents said that direct store delivery (mean = 2.69), price verification (mean = 2.68), time and attendance (mean = 2.48), scale interface (mean = 2.41) and labor scheduling (mean = 2.40) are the primary applications they perceive to obtain major benefits from by the middle of the decade. They all have relatively high mean scores and modes of 3.0 (Table 16).

PLEASE RATE EACH MARKETING APPLICATION BY CIRCLING THE NUMBER THAT BEST DESCRIBES THE DEGREE TO WHICH IN-STORE SYSTEMS HAVE AIDED YOUR COMPANY TO DATE AND THE DEGREE TO WHICH YOU ANTICIPATE EACH TO BENEFIT YOU BY 1995.

TABLE 16

RATINGS OF ANTICIPATED BENEFITS FROM IN-STORE APPLICATIONS BY 1995

APPLICATION	BASE	MEAN	MODE
DIRECT STORE DELIVERY	(182)	2.69	3
PRICE VERIFICATION	(177)	2.68	3
TIME AND ATTENDANCE	(172)	2.48	3
SCALE INTERFACE	(178)	2.41	3
LABOR SCHEDULING	(177)	2.4	3
EFT	(167)	2.19	3
CREDIT	(172)	2.17	2
FAX MACHINE	(166)	2.07	2
ELECTRONIC MAIL	(165)	2.04	2
EBT	(165)	1.93	2
COMPUTER ASSISTED REORDER	(165)	1.89	2
ENERGY MANAGEMENT	(161)	1.84	1
VIDEO RENTALS	(159)	1.79	1
ELECTRONIC SHELF LABELS	(165)	1.74	1
PHARMACY	(155)	1.7	1

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

Large companies are more likely to expect major benefits from in-store applications than smaller ones. For instance, they are more likely to anticipate major benefits from electronic mail by 1995 than their smaller counterparts. The data show that 44 percent of large firms anticipate major benefits from electronic mail compared to only 16 percent among smaller ones (Table 17). In addition, large companies are more predisposed to think that time and attendance packages will be an enormous help by 1995 compared with their smaller counterparts. Sixty-seven percent of large firms anticipate experiencing significant benefits from time and attendance applications compared to 48 percent among smaller ones (Table 18). Also, large companies are more likely than smaller firms to anticipate major benefits from labor scheduling -- 61 percent vs. 42 percent (Table 19). Finally, large firms are more likely to anticipate some benefit from energy management applications by 1995 compared to small firms, as shown by 48 percent of large firms that reported some benefits compared to 28 percent among smaller ones (Table 20).

TABLE 17

ELECTRONIC MAIL BENEFIT IN 1995 BY NUMBER OF STORES

	TOTAL	10 OR LESS	OVER 10
BASE:	(65)	(82)	(77)
	%	%	%
NONE	26	44	9
SOME	44	40	47
MAJOR	30	16	44

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

TABLE 18

TIME AND ATTENDANCE BENEFIT IN 1995
BY NUMBER OF STORES

	TOTAL	10 OR LESS	OVER 10
BASE:	(172)	(88)	(79)
	%	%	%
NONE	9	16	1
SOME	35	36	32
MAJOR	56	48	67

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

TABLE 19

LABOR SCHEDULING BENEFIT IN 1995
BY NUMBER OF STORES

	TOTAL	10 OR LESS	OVER 10
BASE:	(177)	(93)	(79)
	%	%	%
NONE	10	12	8
SOME	41	46	32
MAJOR	50	42	61

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

TABLE 20

ENERGY MANAGEMENT BENEFIT IN 1995
BY NUMBER OF STORES

	TOTAL	10 OR LESS	OVER 10
BASE:	(181)	(83)	(75)
	%	%	%
NONE	39	47	31
SOME	37	28	48
MAJOR	24	25	21

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

ELECTRONIC TRANSFERS

About a fourth of all respondents have electronic fund transfers (EFT's) in one or more of their stores, almost half of whom have had it for more than a year but less than two years (Table 21). The amount paid for each transaction varies widely from company to company, although the median cost is 10¢.

Approximately a tenth of all respondents currently have electronic benefit transfers (EBT's) in at least one of their stores, with almost three-fourths having installed the application within the last year (Table 22). As stated, these numbers may be slightly higher than industry averages because the sample consists of FMI members, generally considered at the cutting edge of technology.

ON AVERAGE, HOW LONG HAVE YOUR STORES BEEN USING ELECTRONIC FUND TRANSFERS?

TABLE 21

DURATION OF ELECTRONIC FUND TRANSFERS IN STORES

	TOTAL
BASE:	(60)
UP TO 12 MONTHS	32
13-24 MONTHS	45
25 MONTHS +	23

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

ON AVERAGE, HOW LONG HAVE YOUR STORES BEEN USING ELECTRONIC BENEFIT TRANSFERS?

TABLE 22

DURATION OF ELECTRONIC BENEFIT TRANSFERS IN STORES

	TOTAL
BASE	(20)
UP TO 12 MONTHS	70
13-24 MONTHS	5
25 MONTHS +	25

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

ELECTRONIC MARKETING APPLICATIONS

Relative to other in-store applications, the penetration rate of electronic marketing is low as shown by high percentages of companies that do not have electronic marketing applications in any of their stores (Table 23). Compared to the present, companies anticipate that a greater number of stores will have electronic marketing applications in at least some of their stores by the end of 1992 (Tables 23 and 24).

Overall, companies have not been experiencing significant benefits from many of the electronic marketing applications. In-store broadcasting, the application which garnered the highest rating, had a mean score at 1.61 and a mode of 1.0 (Table 25).

By and large, companies anticipate increased benefits from electronic marketing applications by 1995, as shown by mean scores that are generally closer to 2.0, slightly higher than those of today. Electronic coupons and frequent shopper programs are the primary applications respondents perceive to obtain some benefit from by the middle of the decade with mean scores of 2.34 and 2.17, respectively and modes of 3.0 (Table 26).

BELOW IS A LIST OF ELECTRONIC MARKETING APPLICATIONS. LIST THE NUMBER OF STORES THAT:

- CURRENTLY USE EACH APPLICATION;
- PLAN TO USE EACH APPLICATION BY THE END OF 1992.

TABLE 23

PERCENT OF STORES WITH ELECTRONIC MARKETING APPLICATIONS CURRENTLY IN USE

	BASE	NONE	1-24%	25-49%	50-74%	75-99%	100%
ELECTRONIC COUPONS	(170)	81	7	1	2	1	8
IN-STORE BROADCASTING	(170)	72	1	1	2	2	23
ELECTRONIC REBATES	(170)	94	2	--	--	--	4
FREQUENT SHOPPER	(170)	88	6	1	--	--	5
ELECTRONIC SIGNS	(170)	81	4	3	1	2	9
VIDEOCARTS	(170)	96	4	--	--	--	--
ELECTRONIC KIOSKS	(170)	93	4	1	1	--	1
VIDEO DISPLAYS	(170)	91	1	1	2	1	5
HOME SHOPPING	(170)	93	4	1	1	1	1

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

TABLE 24

PERCENT OF STORES WITH ELECTRONIC MARKETING APPLICATIONS BY 1992

	BASE	NONE	1-24%	25-49%	50-74%	75-99%	100%
ELECTRONIC COUPONS	(170)	68	4	4	4	4	1
IN-STORE BROADCASTING	(170)	69	2	1	1	--	28
ELECTRONIC REBATES	(170)	89	1	1	1	--	8
FREQUENT SHOPPER	(170)	75	4	2	2	--	17
ELECTRONIC SIGNS	(170)	77	4	2	3	1	14
VIDEOCARTS	(170)	92	6	--	1	--	1
ELECTRONIC KIOSKS	(170)	91	5	1	1	--	2
VIDEO DISPLAYS	(170)	87	2	--	1	2	9
HOME SHOPPING	(170)	92	4	1	1	1	2

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

PLEASE RATE EACH IN-STORE APPLICATION BY CIRCLING THE NUMBER THAT BEST DESCRIBES THE DEGREE TO WHICH IN-STORE SYSTEMS HAVE AIDED YOUR COMPANY TO DATE AND THE DEGREE TO WHICH YOU ANTICIPATE EACH TO BENEFIT YOU BY 1995.

TABLE 25

RATINGS OF BENEFITS FROM ELECTRONIC MARKETING APPLICATIONS TO DATE

APPLICATIONS	BASE	MEAN	MODE
IN-STORE BROADCASTING	(80)	1.61	1
ELECTRONIC COUPONS	(78)	1.52	1
ELECTRONIC SIGNS	(72)	1.49	1
FREQUENT SHOPPER	(70)	1.36	1
VIDEO DISPLAYS	(65)	1.27	1
HOME SHOPPING	(64)	1.25	1
ELECTRONIC REBATES	(67)	1.22	1
ELECTRONIC KIOSKS	(64)	1.14	1
VIDEO CARTS	(63)	1.11	1

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

TABLE 26

RATINGS OF ANTICIPATED BENEFITS FROM ELECTRONIC MARKETING APPLICATIONS BY 1995

ELECTRONIC MARKETING APPLICATION	BASE	MEAN	MODE
ELECTRONIC COUPONS	(83)	2.34	3
FREQUENT SHOPPER	(73)	2.17	3
ELECTRONIC REBATES	(68)	1.97	2
IN-STORE BROADCASTING	(76)	1.78	2
ELECTRONIC SIGNS	(69)	1.73	2
VIDEO DISPLAYS	(63)	1.67	1
HOME SHOPPING	(64)	1.48	1
ELECTRONIC KIOSKS	(63)	1.46	1
VIDEO CARTS	(64)	1.41	1

SOURCE: IN-STORE SYSTEMS SURVEY, FOOD MARKETING INSTITUTE, 1991

DATA COMMUNICATION METHOD

Among the total sample, dial-up telephone is currently the most popular method of data communication. Ninety-three percent of the sample use it, whereas 58 percent use leased lines and 33 percent use satellite communications. Companies report that they have been using dial-up lines as much this year as they did last year (Table 27). They predict the same level of dial up line usage in 1992 as in 1991. Leased telephone lines and satellite communications are predicted to be used more in 1992 compared to this year (Table 28).

PLEASE INDICATE THE DATA COMMUNICATION METHOD THAT BEST DESCRIBES YOUR FIRM'S USE OF EACH METHOD IN 1991 COMPARED TO 1990 BY CIRCLING THE APPROPRIATE NUMBER.

TABLE 27

DATA COMMUNICATION USAGE IN 1991

	BASE	LESS THAN 1990	SAME AS 1990	MORE THAN 1990	NOT APPLICABLE
		%	%	%	%
DIAL UP TELEPHONE LINES	(135)	6	50	37	7
LEASED TELEPHONE LINES	(118)	2	27	30	42
SATELLITE COMMUNICATION	(106)	1	9	13	77

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

PLEASE INDICATE THE DEGREE TO WHICH YOUR FIRM PLANS TO USE EACH DATA COMMUNICATION METHOD IN 1992 BY CIRCLING THE APPROPRIATE NUMBER.

TABLE 28

DATA COMMUNICATION USAGE IN 1992

	BASE	COMPLETELY DISCONTINUE	LESS THAN 1991	SAME AS 1991	MORE THAN 1991
		%	%	%	%
DIAL UP TELEPHONE LINES	(140)	4	24	49	23
LEASED TELEPHONE LINES	(108)	6	5	32	57
SATELLITE COMMUNICATION	(63)	13	3	35	49

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

LOCATION AT WHICH APPLICATIONS ARE USED

Point-of-sale scan support tends to be used at both stores and headquarters more than it is at solely headquarters or stores (Table 29).

BELOW IS A LIST OF HEADQUARTER SUPPORT APPLICATIONS. CHECK OFF THE COLUMN THAT BEST DESCRIBES WHERE YOUR COMPANY USES THEM.

TABLE 29

LOCATION AT WHICH APPLICATIONS ARE USED

	BASE	STORES ONLY	HEADQUARTERS ONLY	BOTH STORES & HEADQUARTERS	NOT APPLICABLE
		%	%	%	%
POS SCAN SUPPORT	(196)	28	9	55	9
STORE ELECTRONIC ORDERING	(178)	38	2	25	35
HEADQUARTER ELECTRONIC ORDERING	(157)	5	19	8	69
LABOR SCHEDULING	(178)	42	2	18	38
DIRECT PRODUCT PROFITABILITY	(169)	8	15	7	70
IN-STORE HELP DESK	(171)	9	30	20	42
SHELF SPACE MANAGEMENT	(172)	12	26	21	41

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

DECISION-MAKERS/EVALUATORS

Seventy-four percent of respondents report that the same person makes purchase decisions and evaluations for point-of-sale systems, in-store systems and other applications. Small companies, however, are more likely to have the same person perform those functions compared to larger firms, as indicated by 82 percent of smaller firms vs. 61 percent among larger ones. (Table 30). Oftentimes the responsibility of purchasing and evaluating the various systems lies with the owner/chief executive or MIS/data-processing executive (Table 31). However, even during cases where the point-of-sale purchaser is different from the evaluator, the owner/chief executive and the MIS/data processing executive remain the top two personnel who have that responsibility. The difference lies in the relative frequencies of these occurrences (Tables 32-37).

IN YOUR COMPANY, DOES THE SAME PERSON MAKE PURCHASE DECISIONS AND EVALUATIONS FOR POS SYSTEMS, IN-STORE SYSTEMS AND OTHER APPLICATIONS?

TABLE 30

WHETHER OR NOT THE SAME PERSON MAKES PURCHASE DECISIONS AND EVALUATIONS FOR POS SYSTEMS, IN-STORE SYSTEMS AND OTHER APPLICATIONS BY NUMBER OF STORES

	TOTAL	10 OR LESS	OVER 10
BASE	(200)	(113)	(82)
	%	%	%
YES	74	82	61
NO	27	18	39

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

TABLE 31

TITLE OF PERSON RESPONSIBLE FOR PURCHASE DECISIONS AND EVALUATIONS FOR POS SYSTEMS, IN-STORE SYSTEMS, AND OTHER APPLICATIONS

	TOTAL
BASE:	(145)
	%
TITLE	
OWNER/PRESIDENT/CEO/GENERAL MGR	35
MIS/DATA PROCESSING	28
RETAIL/STORE MANAGER	17
FISCAL/ADMINISTRATION	12
VICE PRESIDENT	6
OTHER (ADM ASST, TRAINING SPECIALIST)	1

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

TABLE 32

TITLE OF POS SYSTEM PURCHASE DECISION-MAKER

	TOTAL
BASE:	(54)
	%
TITLE	
OWNER/PRESIDENT/CEO/GENERAL MANAGER	30
MIS/DATA PROCESSING/SYSTEMS MANAGEMENT	30
COMMITTEE/BOARD/GROUP	13
RETAIL/STORE MANAGEMENT	13
FISCAL/ADMINISTRATIVE/FINANCE	7
RETAIL SALES	4
OTHER	4

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

TABLE 33

TITLE OF IN-STORE SYSTEM PURCHASE DECISION-MAKER

	TOTAL
BASE	(54)
	%
TITLE	
OWNER/PRESIDENT/CEO/GENERAL MANAGER	30
MIS/DATA PROCESSING/SYSTEMS MANAGEMENT	24
COMMITTEE/BOARD/GROUP	13
RETAIL/STORE MANAGEMENT	15
FISCAL/ADMINISTRATIVE/F'NANCE	11
RETAIL SALES	2
OTHER	6

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

TABLE 34

TITLE OF OTHER APPLICATIONS PURCHASE DECISION MAKER

	TOTAL
BASE	(44)
	%
TITLE	
OWNER/PRESIDENT/CEO/GENERAL MANAGER	34
MIS/DATA PROCESSING/SYSTEMS MANAGEMENT	25
COMMITTEE/BOARD/GROUP	16
RETAIL/STORE MANAGEMENT	9
FISCAL/ADMINISTRATIVE/FINANCE	9
RETAIL SALES	-
OTHER	7

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

TABLE 35

TITLE OF POS SYSTEM EVALUATOR

	TOTAL
BASE:	(48)
	%
TITLE	
OWNER/PRESIDENT/CEO/GENERAL MANAGER	5
MIS/DATA PROCESSING/CSYSTEMS MANAGEMENT	49
COMMITTEE/BOARD/GROUP	12
RETAIL/STORE MANAGEMENT	12
FISCAL/ADMINISTRATIVE/FINANCE	14
RETAIL SALES	--
OTHER	9

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

TABLE 36

TITLE OF IN-STORE SYSTEMS EVALUATOR

	TOTAL
BASE:	(43)
	%
TITLE	
OWNER/PRESIDENT/CEO/GENERAL MANAGER	2
MIS/DATA PROCESSING/SYSTEMS MANAGEMENT	54
COMMITTEE/BOARD/GROUP	12
RETAIL/STORE MANAGEMENT	14
FISCAL/ADMINISTRATIVE/FINANCE	14
RETAIL SALES	
OTHER	5

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

TABLE 37

TITLE OF OTHER APPLICATIONS EVALUATOR

	TOTAL
BASE:	(37)
	%
TITLE	
OWNER/PRESIDENT/CEO/GENERAL MANAGER	3
MIS/DATA PROCESSING/SYSTEMS MANAGEMENT	51
COMMITTEE/BOARD/GROUP	16
RETAIL/STORE MANAGEMENT	11
FISCAL/ADMINISTRATIVE/FINANCE	14
RETAIL SALES	--
OTHER	5

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

PROBLEMS

Overall, system problems are either implementation or integration-related and the solutions are primarily replacements or upgraded equipment.

As reported by the responding companies, maintenance/support (18 percent), obsolescence/limited capacity (14 percent), communication/integration (13 percent) and scanning (13 percent) are the most common point-of-sale problems (Table 38).

Respondents report that systems integration (29 percent) and systems implementation (28 percent) are the two major in-store application problems (Table 39). Voluminous data and data usage are among the common electronic marketing problems.

WHAT ARE YOUR MAJOR POS SYSTEM PROBLEMS?

TABLE 38

MAJOR POS SYSTEMS PROBLEMS

	TOTAL
BASE	(137)
	%
MAINTENANCE/SUPPORT	18
OBSOLESCENCE/LIMITED CAPACITY	14
COMMUNICATION/INTEGRATION	13
SCANNING	13
HARDWARE/SOFTWARE	10
FRONT END	5
PRICING ACCURACY	4
OTHER	23

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

WHAT ARE YOUR MAJOR IN-STORE APPLICATION PROBLEMS?

TABLE 39

MAJOR IN-STORE APPLICATION PROBLEMS

	TOTAL
BASE	(83)
	%
SYSTEM INTEGRATION	29
SYSTEM IMPLEMENTATION	28
TRAINING/SUPPORT/MAINTENANCE	10
HARDWARE/SOFTWARE	8
OTHER	25

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

CHALLENGES

The single biggest application integration challenge of respondents is integrating multiple systems in general, garnering 31 percent, followed by direct store delivery (16 percent) and frequent shopper (8 percent). However, it should be pointed out that roughly a third of respondents have a variety of challenges, some of which include vendor support, labor scheduling, and time and attendance (Table 40). Responses regarding the foremost systems integration challenge vary widely although they include linking point-of-sale system to the host mainframe, reducing redundant data and tying in-store systems to those of headquarters.

WHAT IS YOUR BIGGEST APPLICATION INTEGRATION CHALLENGE?

TABLE 40

FOREMOST APPLICATION INTEGRATION CHALLENGE

	TOTAL
BASE	(77)
	%
MULTIPLE SYSTEM INTEGRATION	31
DSD	16
FREQUENT SHOPPER	8
SOFTWARE SUPPORT	4
SCAN SUPPORT	4
OTHER	38

SOURCE: IN-STORE SYSTEMS STUDY, FOOD MARKETING INSTITUTE, 1991

FMI 1991 IN-STORE APPLICATIONS SURVEY

Food Marketing Institute is conducting a survey of companies about in-store applications. (This is separate from the FMI Information Systems survey which you may have received earlier.) The objective of this survey is to provide you with information about store level technology to aid in evaluating operational performance.

Answer the entire questionnaire and use total company information, rather than division information.

All responses will be held in strict confidence. If you have any questions, call Michelle Topacio at FMI, (202) 429-4551. Please return the completed surveys by Friday, August 30, 1991.

POINT-OF-SALE SCANNING SYSTEMS

1. Below is a list of POS system vendors. Indicate the number of stores your company has that makes use of each vendor.

System Name	Number of Stores
DataChecker/ICL/Fujitsu	_____
DTS	_____
IBM	_____
NCR	_____
Sweda	_____
Tec	_____
Casio	_____
Other (Please specify) _____	_____

2. What percent of your company's stores do you expect to be equipped with POS scan systems by December 1992? _____%

3. What percent of the 1992 POS capital budget will be allocated for new system installations?

_____ Up to 25%
_____ 26% - 50%
_____ 51% - 75%
_____ 76% - 100%

4. What percent of the 1992 POS capital budget will be allocated for system upgrades? (Make sure that the total for Q.3 and Q.4 equal 100%.)

_____ Up to 25%
_____ 26% - 50%
_____ 51% - 75%
_____ 76% - 100%

5. What are your major POS system problems and the corresponding solutions you have used to address each?

Problems	Solutions
_____	_____
_____	_____
_____	_____

6. Below is a list of benefits associated with POS systems. Kindly rate each benefit by circling the number that best describes the degree to which POS systems have aided your company to date and the degree to which you anticipate it to benefit you by 1995.

	Benefit-To-Date			Benefit by 1995		
Benefit	None	Some	Major	None	Some	Major
Increased Sales	1	2	3	1	2	3
Better Customer Service	1	2	3	1	2	3
New Customer Services	1	2	3	1	2	3
Lower Total Store Labor Costs	1	2	3	1	2	3
Lower Front-End Costs	1	2	3	1	2	3
Increased Product Variety	1	2	3	1	2	3
Increased Product Mix Profitability	1	2	3	1	2	3
Improved Pricing Accuracy	1	2	3	1	2	3
Improved Advertising/Promotions	1	2	3	1	2	3
Better Inventory Management	1	2	3	1	2	3

IN-STORE APPLICATIONS

7. Below is a list of in-store applications. List the number of stores in your company that:

   - o Currently use each application;
   - o Plan to use each application by the end of 1992.

Store Application	# Stores Active	# Stores Planned By Dec. 31, 1992
Direct Store Delivery	_____	_____
Pharmacy	_____	_____
Labor Scheduling	_____	_____
Time & Attendance	_____	_____
Electronic Shelf Labels	_____	_____
Price Verification	_____	_____
Computer-assisted Re-order	_____	_____
Energy Management	_____	_____
Video Rentals	_____	_____
Scale Interface	_____	_____
Electronic Mail	_____	_____
Fax Machine	_____	_____
Credit Cards	_____	_____
Electronic Benefit Transfer (govt. programs-e.g. food stamps)	_____	_____
Electronic Fund Transfer (all other electronic transactions)	_____	_____
Other (please specify)_____	_____	_____

8. Please rate each in-store application by circling the number that best describes the degree to which in-store systems have aided your company to date and the degree to which you anticipate each to benefit you by 1995.

	Benefit-To-Date			Benefit by 1995		
Store Application	None	Some	Major	None	Some	Major
Direct Store Delivery	1	2	3	1	2	3
Pharmacy	1	2	3	1	2	3
Labor Scheduling	1	2	3	1	2	3
Time & Attendance	1	2	3	1	2	3
Electronic Shelf Labels	1	2	3	1	2	3
Price Verification	1	2	3	1	2	3
Computer Assister Re-Order	1	2	3	1	2	3
Energy Management	1	2	3	1	2	3
Video Rentals	1	2	3	1	2	3
Scale Interface	1	2	3	1	2	3
Electronic Mail	1	2	3	1	2	3
Fax Machine	1	2	3	1	2	3
Credit Cards	1	2	3	1	2	3
Electronic Benefit Transfer (gov't. programs - e.g. food stamps)	1	2	3	1	2	3
Electronic Fund Transfer (all other electronic transactions)	1	2	3	1	2	3
Other (please specify)_____	1	2	3	1	2	3

If your stores currently offer Electronic Fund Transfers (EFT) answer Q.9-10. If not, skip to Q.11.

9. On average, how long have your stores been using electronic fund transfers?

_____ Up to 12 months
_____ 13 - 24 months
_____ 25 months or more

10. How much do your stores pay for each electronic fund transaction?_____

If your stores offer Electronic Benefit Transfers (EBT), answer Q.11-12. If not, skip to Q.13.

11. On average, how long have your stores been using electronic benefit transfers?

_____ Up to 12 months
_____ 13 -24 months
_____ 25 months or more

12. How much do your stores pay for each electronic benefit transaction? _____

13. What are your major in-store application problems and the corresponding solutions you have used to address each?

Problems	Solutions
_____	_____
_____	_____
_____	_____

OTHER APPLICATIONS

Questions 14-17 are on electronic marketing. If your supermarkets have electronic marketing applications answer Q.14-17. If not, skip to Q.18.

14. Below is a list of electronic marketing applications. List the number of stores that:

- o Currently use each application;
- o Plan to use each application by the end of 1992.

Store Application	# Stores Active	# Stores Planned By Dec. 31, 1992
Electronic Coupons	_____	_____
In-store Broadcasting	_____	_____
Electronic Rebates	_____	_____
Frequent Shopper	_____	_____
Electronic Signs	_____	_____
Videocarts	_____	_____
Electronic Kiosks	_____	_____
Video Displays	_____	_____
Home Shopping	_____	_____
Other (Please specify) _____	_____	_____

15. Please rate each marketing application by circling the number that best describes the degree to which in-store systems have aided your company to date and the degree to which you anticipate each to benefit you by 1995.

	Benefit-To-Date			Benefit by 1995		
Store Application	None	Some	Major	None	Some	Major
Electronic Coupons	1	2	3	1	2	3
In-Store Broadcasting	1	2	3	1	2	3
Electronic Rebates	1	2	3	1	2	3
Frequent Shopper	1	2	3	1	2	3
Electronic Signs	1	2	3	1	2	3
Video Carts	1	2	3	1	2	3
Electronic Kiosks	1	2	3	1	2	3
Video Displays	1	2	3	1	2	3
Home Shopping	1	2	3	1	2	3
Other (Please specify)_____	1	2	3	1	2	3

16. What are your major electronic marketing problems and the corresponding solutions you have used to address each.

Problems	Solutions
_____	_____
_____	_____
_____	_____

17. Please indicate the data communication method that best describes your firm's use of each method in 1991 compared to 1990 by circling the appropriate number.

Communication Method	Less Than 1990	Same As 1990	More Than 1990	Not Applicable
Dial Up Telephone Lines	1	2	3	0
Lease Telephone Lines	1	2	3	0
Satellite Communication	1	2	3	0

If all three methods of communication are not applicable to your company, skip to Q.19. Otherwise, go to Q.18.

18. Please indicate the degree to which your firm plans to use each data communication method in 1992 by circling the appropriate number. (Answer only those that were applicable to you in Q.17.)

Communication Method	Completely Discontinue	Less Than 1991	Same As 1991	More Than 1991
Dial Up Telephone Lines	1	2	3	4
Lease Telephone Lines	1	2	3	4
Satellite Communication	1	2	3	4

19. Below is a list of headquarter support applications. Check off the column that best describes where your company uses them.

Application	Stores Only	Headquarters Only	Both Stores & Headquarters	Not Applicable
POS Scan Support	/___/	/___/	/___/	/___/
Store Electronic Ordering	/___/	/___/	/___/	/___/
HQ Electronic Ordering	/___/	/___/	/___/	/___/
Labor Scheduling	/___/	/___/	/___/	/___/
Direct Product Profitability	/___/	/___/	/___/	/___/
In-store Systems Help Desk	/___/	/___/	/___/	/___/
Shelf Space Management	/___/	/___/	/___/	/___/
Other (Please Specify) _____	/___/	/___/	/___/	/___/

20. What is your biggest system integration challenge? _____
_____
_____

21. What is your biggest application integration challenge? _____
_____
_____

22. In your company, does the same person make purchase decisions and evaluations for POS systems, in-store systems and other applications?

_____ Yes Title: _____
_____ No

If no, list the titles of the persons making purchase decisions and evaluations.

	Purchase Decisions	Evaluations
POS Systems	_____	_____
In-Store Systems	_____	_____
Other Applications	_____	_____

GENERAL INFORMATION

23. How many supermarkets with annual sales of over $2 million does your company operate? _____

24. What was your company's approximate annual sales in 1990? $_____

Your participation and cooperation is greatly appreciated. Rest assured that your responses will remain confidential.

A complimentary copy of the final report will be sent to you later this year. To enable us to do so, however, we will need you to fill out the following information:

Name _____

Title _____

Company _____

Address _____

_____

Telephone _____

Please return questionnaire by mail in the enclosed self-addressed envelope or fax to:

Michelle Topacio
Manager, Research
Food Marketing Institute
1750 K Street, NW
Washington, DC 20006-2394

Fax #: (202) 429-4529

FMI Business Building Publications

If you need data, facts or background information about key food distribution issues, FMI's research publications may be just what you're looking for. Call 202/429-8298 for more information.

Consumer Research

How Consumers are Shopping the Supermarket — NEW!
This new study provides valuable data on consumer shopping patterns, including how shopping behavior varies by store size and how customers shop different departments of a supermarket.
Price: FMI Members: $15
Non-members: $30

The Service Advantage-1991: How Consumers Evaluate Service in Their Supermarket Experience — NEW!
This new report addresses consumer attitudes and expectations regarding service in supermarkets.
Price: FMI Members and Non-members: $30

Consumer Attitudes Toward Supermarket Pharmacies — NEW!
This recent study focuses on the changing retail pharmacy environment, including consumer perceptions of the relationship between the pharmacy, health and beauty care products (HBC) and the overall store.
Price: FMI Members: $15
Non-members: $30

Trends: Consumer Attitudes & the Supermarket 1991
Price: FMI Members: $25
Non-members: $50

The Green Shopping Revolution: How Solid Waste Issues are Affecting Consumer Behavior
Consumer attitudes on food shopping and solid waste.
Price: FMI Members and Non-members: $30

Dinnertime USA
How to cash in on the dining-at-home trend.
Price: FMI Members and Non-members: $30

Targeting Food Customers
A comprehensive guide to using secondary research for the smaller or mid-size retailer.
Price: FMI Members: $15
Non-members: $30

Shopping a la Cart: The Changing Environment of the Takeout Food Market
A report that examines the attitudes and behaviors of takeout food customers.
Price: FMI Members: $15
Non-members: $30

Financial Studies

Operating Results of Independent Supermarkets
A managerial tool to help retailers evaluate store operating results.
Price: FMI Members: $25
Non-members: $50

Profitrak Software Package for Independent Operators — NEW!
This easy-to-use software package can calculate valuable profit ratios and productivity figures.
Price: FMI Members: $125
Non-members: $175

Annual Financial Review
Annual report for the supermarket industry.
Price: FMI Members: $15
Non-members: $30

Operations Review
Quarterly operations and productivity reports.
Price: FMI Members: $25
Non-members: $50

Industry Performance

Food Marketing Industry Speaks 1991
Summary of results from four different surveys: retail and distributon center, operations, energy and refrigeration issues and prepared foods.
Price: FMI Members: $20
Non-members: $40

Detailed Tablulations from "Food Marketing Industry Speaks 1991"
Detailed results from the "Speaks" surveys. Data are delineated by company size, geographic region and other measures as appropriate.
Price: (Includes "Speaks" report)
FMI Members: $25
Non-members: $50

Strategic Management

Micro-Merchandising: Targeted Consumer and Category Merchandising — NEW!
This new report defines micro-merchandising's value to food retailers and describes how micro-merchandising can be used as a valuable tool in developing successful consumer targeting strategies.
Price: FMI Members: $15
Non-members: $30

Front-End Electronic Marketing: Frequent Shopper and Other Programs — NEW!
A companion to *Perspectives on Electronic Marketing*, this primer focuses on marketing systems at the POS.
Price: FMI Members: $15
Non-members: $30

Perspectives on Electronic Marketing
First in a series of reports on implementing electronic marketing programs.
Price: FMI Members: $15
Non-members: $30

The Annual Business Planning Meeting
Practical suggestions and guidelines for developing an effective annual business meeting.
Price: FMI Members and Non-members: $15

Facts About Store Development 1991
This annual report examines new store costs and size, store formats, remodelings and rental and leasing arrangements.
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FMI Strategic Planning Resource Guide
A summary of key industry issues for the 1990s plus a set of charts and graphs that can stimulate the discussions necessary to develop an in-house strategic plan.
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